

Osprey Approach: Cheque Printing Setup

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May 14th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=30699>

[Click here for a printer-friendly version](#)



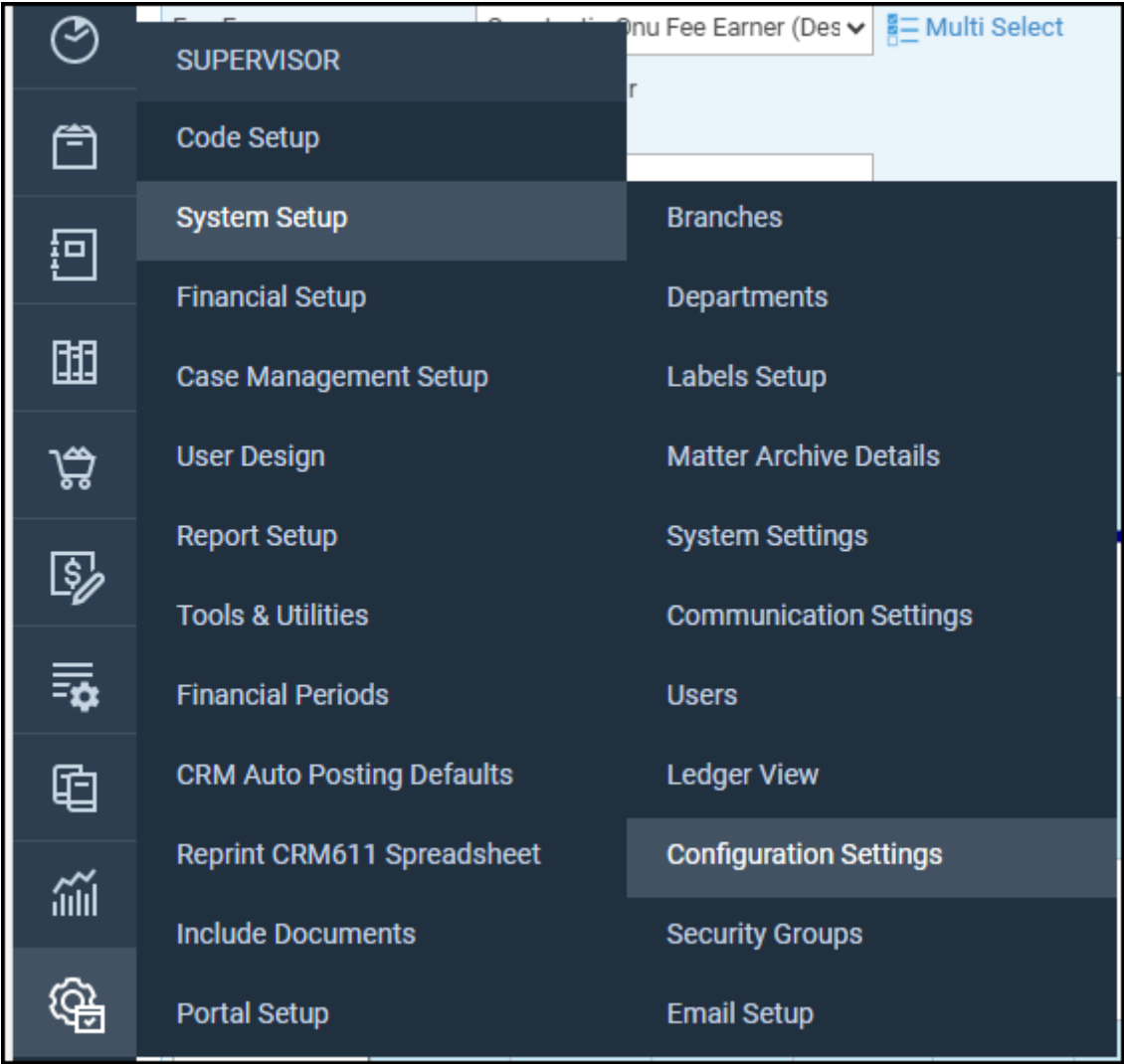
This guide will go through the cheque printing setup, enabling you to run any cheques on pre-printed stationery

Osprey can print your cheques onto pre-printed stationery, saving time writing cheques which have already been posted on the system.

You should contact your bank to arrange for pre-printed stationery to be provided. Once you have pre-printed stationery or a template copy from your bank, you can set up the system ready to start printing your cheques.

Enable cheque printing


Before you can print cheques, you will need to enable the option on the system. Select Supervisor > System Setup > Configuration Settings.



Locate the switch called Cheque Printing, right click it and select Edit

Cheque Printing

Client Auto Numbering

 Edit

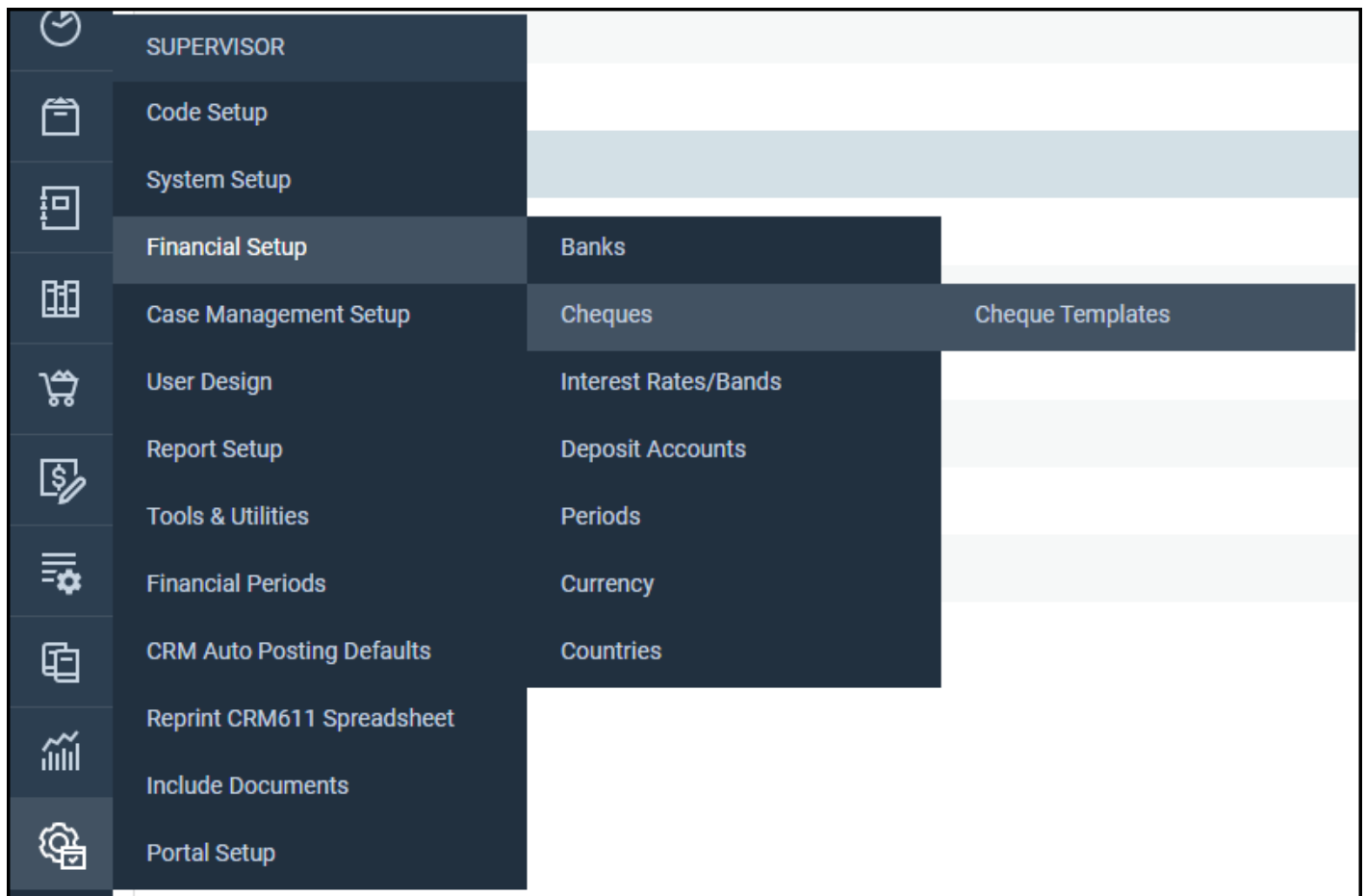
Change False to True, then Save your changes.

SWITCH NAME	SWITCH VALUE
Automatic Timer Start	True
Bill Auto Numbering	True
Bill Filtering	False
Cheque Printing	True

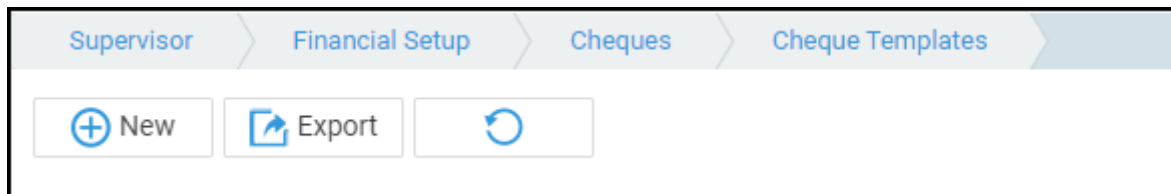
Design your cheque template

You will now need to design the Word document template to fit your stationery.

Select Supervisor > Financial Setup > Cheques > Cheque Templates



Select New



Enter a description, and select whether you would like your cheque to display as unitary or as a sentence.
e.g. Unitary cheques have the units split so an amount of £2320.25 would look like this:

Thousands	Hundreds	Tens	Units	Pence
2	3	2	0	25

Unitary cheque

Non-unitary cheques have the amount shown in words e.g.

Amount:
Two thousand three hundred and twenty pounds twenty five pence

Non-unitary cheque

Finally, choose the currency and click Save.

The screenshot shows a web interface with a breadcrumb trail: Supervisor > Financial Setup > Cheque Template > Add. Below the trail are two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red 'x' icon). The form contains three fields: 'Cheque Description:' with the value 'Client Bank Cheque', 'Unitary:' with a checked checkbox, and 'Cheque Currency:' with a dropdown menu showing 'Pound Sterling' and a downward arrow.

To open the template for editing, right click your template, click Edit

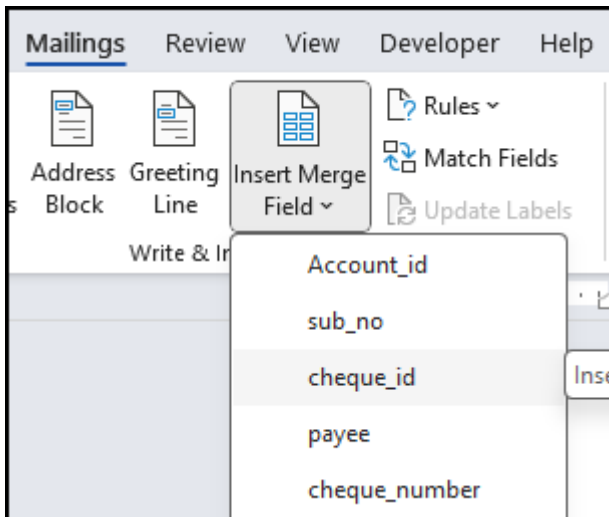
The screenshot shows a web interface with a breadcrumb trail: Supervisor > Financial Setup > Cheques > Cheque Templates. Below the trail are three buttons: 'New' (with a plus icon), 'Export' (with a download icon), and a refresh icon. A table lists two templates: 'Office Bank Cheque' and 'Client Bank Cheque'. The 'Client Bank Cheque' row is highlighted, and a context menu is open over it, showing an 'Edit' option with a pencil icon.

Now select Design

The screenshot shows a web interface with a breadcrumb trail: Supervisor > Financial Setup > Cheques > > Edit. Below the trail are four buttons: 'Save' (floppy disk icon), 'Cancel' (red 'x' icon), 'Design' (pencil icon), and 'Preview' (magnifying glass icon). The form contains three fields: 'Cheque Description:' with the value 'Client Bank Cheque', 'Unitary:' with an unchecked checkbox, and 'Cheque Currency:' with a dropdown menu showing 'Pound Sterling' and a downward arrow.

Word will open, and you can now create your template to match your stationery. We would recommend using tables for this.














You may insert the relevant merge fields by selecting the Mailings menu and choosing Insert Merge Field to select the field to insert.



When you are finished close and Save the template

Linking your cheque template to the relevant bank(s)

Now that you have designed your Cheque Template you will need to link it to the Bank or Banks that you want to use it for. Navigate to the Supervisor menu, Financial Setup and Banks.

SUPERVISOR	
	Code Setup ed for this user. ▼
	System Setup rs linked ▼
	Financial Setup Banks
	Case Management Setup Cheques
	User Design Interest Rates/Bands
	Report Setup Deposit Accounts
	Tools & Utilities Periods
	Financial Periods Currency
	CRM-AF1 Additional Rates Countries
	CRM Auto Posting Defaults
	Reprint CRM611 Spreadsheet
	Include Documents
	Portal Setup

e: All ▼

MATTER KEY DATE ↑

Click Edit, set the last cheque number (Osprey will add one to this when you post your next cheque), select the Cheque Template and click Save.

BANK ACCOUNT

Bank Type:

Client ▼

☐ Set as default for branch

ALL ▼

Last Cheque Number:

000500

Cheque Template:

Cheque Template ▼

Bank Account Number:

123456

Bank Sort Code:

11-22-00